



## **2019 MDRT Top of the Table Annual Meeting e-Handout Material**

<b>Title:</b>	<b>Supercharge your Future: Leveraging Trends to Consistently Create New Value</b>
<b>Speaker:</b>	Jennifer Borislow and Maria Ferrante-Schepis
<b>Presentation Date:</b>	Thursday September 26, 2019
<b>Presentation Time:</b>	1:15 p.m.- 2:45 p.m.
<b>Session Room:</b>	Poppy

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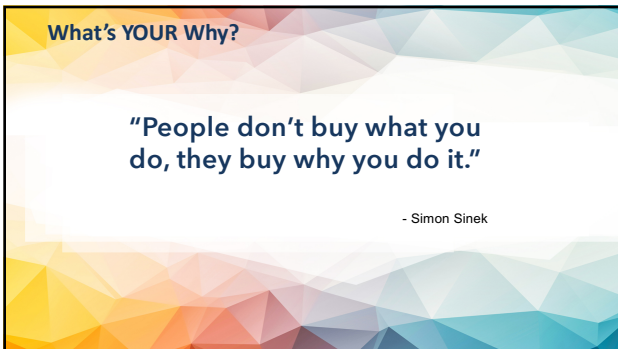
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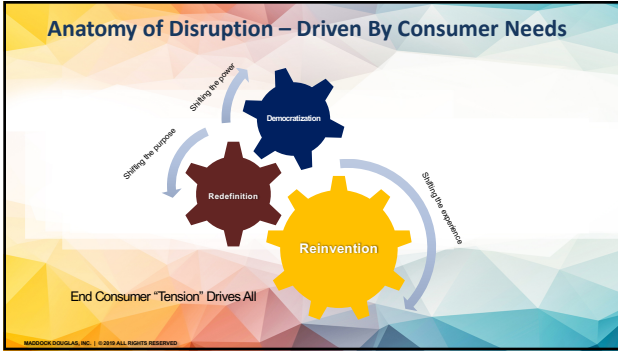
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**Questions?**

1. What's really driving those changes?
2. What might the future look like if you play out the trends?
3. What role will YOU play in that future?

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**Questions?**

1. What's really driving those changes?
2. How can you use those drivers to predict future outcomes?
3. What role will YOU play in that future?

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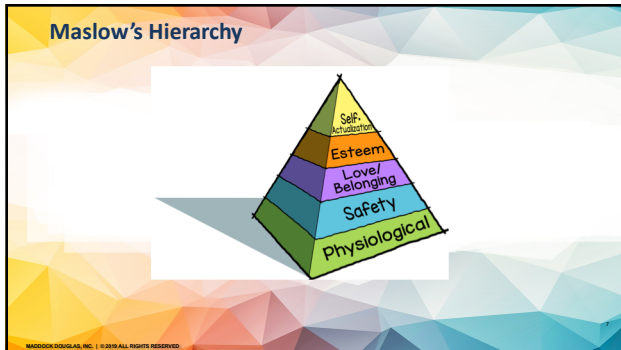
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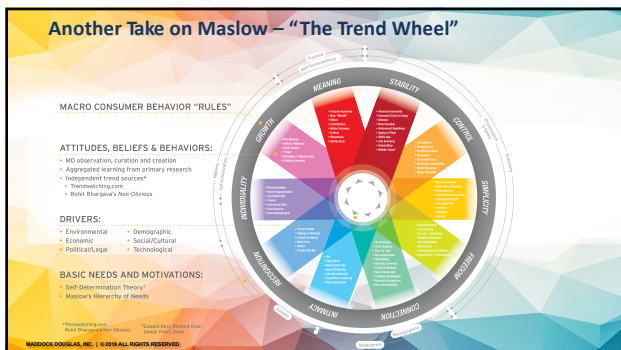
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### Questions?

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**First, Consider Your "Superpower"**

Getting people to do something really important that otherwise would likely remain undone, until it's too late.

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**Finding the Sweet Spot**

**OBJECTIVE:**  
To predict how attitudinal trends will impact human needs in the future, and how your superpower can be used to create **new value**.

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**Relevant Trends - A Few Examples**

- Individuality - Hyper Personalization, Customization
- Control - Radical Authenticity, Transparency, Prosumerism
- Connection - Sharing Economy

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### Hyper Personalization/Customization

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### Radical Authenticity

1. Easy to Understand
2. Down to Earth
3. Memorable
4. Credible
5. Positive
6. Relevant

I'd like to pretend to have your attention for just a few moments.

\*From LIMBA and Woodcock Douglas Study, "Get Real: Authenticity", 2014

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### In the Future...

In the future, most financial advice will educate and engage consumers in easy-to-understand, relatable and authentic ways.

*"Consumers are becoming more aware and are insisting that the advice they receive is completely understood, so advisors will have no choice but to follow suit to maintain their client base."*

Likelihood:

79%

of young adults

Woodcock Douglas, "Sun Life Value of Advice 2019"

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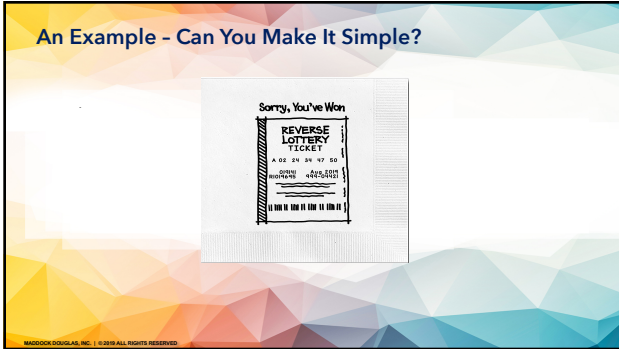
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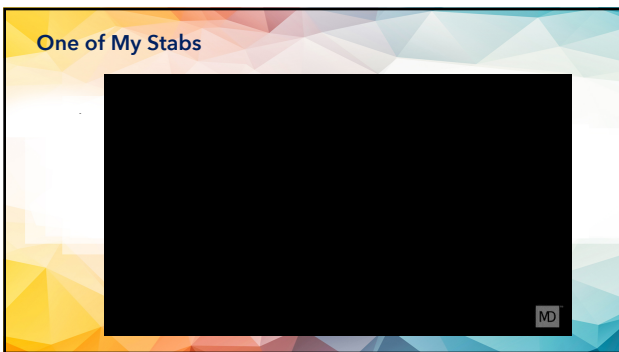
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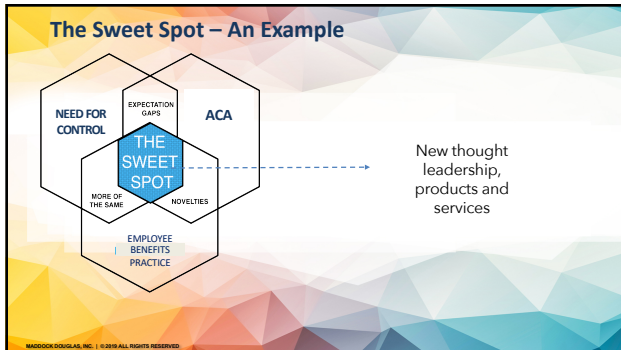
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- ### Questions?
1. What's really driving those changes?
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### An Exercise

1. Review Trend Cards for Inspiration
2. Write Future Value Proposition

**Radical Authenticity**

**Empathic Advising**

**Powerful Simplicity**

#### Value Proposition (Future)

For \_\_\_\_\_ who seek to \_\_\_\_\_  
(Your Firm Here), creates value through \_\_\_\_\_

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**Example**

**Value Proposition (Future)**  
What value proposition do you intend to create for your customers? How will you create and deliver this value proposition? How will you capture this value?

We try your statement to the following sentence format:

For mid-size employers who seek to build a community of health and well-being, Borislow Insurance creates value by making health care easier and more affordable for employees and their families.

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**Making it Real**

**“Culture eats strategy for breakfast.”**

- Peter Drucker

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**Takeaways**

1. Your superpower is non-disruptable.
2. The new skill is consistently finding ways to create new value.
3. Mission is the driver. Impact and profit are the result.
4. Culture above all.

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